HCM 2001 Archives

12/21/2001 - W-4's and W-5's

Please review this information regarding employees filing a W-4 with an exempt from federal withholding tax status and employees filing a W-5 claiming the Advanced Earned Income Credit (EIC).

A new W-4 must be filed if the employees listed on the TAXxxx103 report wish to continue claiming the exempt status from federal withholding tax. When entering the new W-4, access the Federal Tax Data 1 panel (Go, Compensate Employees, Maintain Payroll Data U.S., Use) click on the scroll bar, insert a new effective dated row and set the radio button from "Notification Sent" to "None" and SAVE. An error will occur if an attempt is made to set the radio button "New W-4 Received". This particular PeopleSoft functionality is not being used at this time.

TAXxxx113 Report (W-5 EIC) lists employees who claim "Advanced Earned Income Credit" (EIC) and is sorted by Company, Mail Drop, and employee name.

A new W-5 must be filed if the employees listed on the TAXxxx113 report wish to continue claiming the Advanced Earned Income Credit. When entering a new W-5, access the Federal Tax Data 2 panel (Go, Compensate Employees, Maintain Payroll Data U.S., Use), click on the scroll bar, insert a new effective dated row and set the radio button from "Notification Sent" to "None" and SAVE. If an attempt is made to set the radio button "New W-5 Received" an error will occur. This particular PeopleSoft functionality is not being used at this time.

Please distribute this message to your payroll staff. If there are any questions concerning W-4 or W-5 entry, please call the Phoenix Agency Support number at (404) 657-3956 or 1-888-896-7771.

12/21/2001 - New Queries and a New Process

A number of new queries have been added to the Query List in the Query Data Base and modifications have been made to several existing queries. The Query List available from the Phoenix Web Site has been updated to reflect all the changes and to assure the accuracy of the information provided in the List.

In addition, a new process is under development to provide a mechanism to validate and update employee personal data and emergency contact information.

NEW QUERIES 0HR030 EE Emergency Contacts

The query provides employee Emergency Contact data for a specific employee or by Department ID(s). The following data fields are returned by the query: Empl ID, Name, DeptID, Dept Descr, Contact Name, Relationship, Primary, Address 1, Address 2, Address 3, City, County, State, Zip, Phone Type, Phone.

0HR032_DeptID_Listing

The query provides a listing of Department ID's and Department Descriptions by Company. The following data fields are returned by the query: DeptID, Dept Descr.

0HR033_Mail_Drop_Listing

The query provides a listing of Mail Drops and Mail Drop Descriptions by Company. The following data fields are returned by the query. Maildrop, Maildrop Descr.

For information regarding the following new Work Force Planning queries, please refer to the communication dated November 26, 2001. The communication may be found at the Phoenix Web site or in HR NEWS.

0WP001_Current_Employee Data

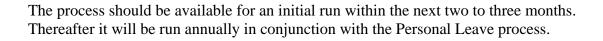
0WP002_WF_Turnover_Actions

0WP003_Employee_Data_As-of-Dt

PERSONAL DATA VERIFICATION

A new process titled PERSONAL DATA VERIFICATION is currently under development. The intent of the process is to annually provide each employee a document detailing that employee's personal and emergency contact data contained in the Phoenix system. In future years, the process will automatically be run in conjunction with the Personal Leave election process.

The process will be designed to generate an InfoPac report detailing individual data. A single page document will be printed for each employee. The document may be distributed to employees for verification/correction. Employee's would be instructed to return the document to their employer's Human Resources office for any necessary data entry in Phoenix. Agencies that do not desire to participate in the verification process will be able to request that the verification forms not be printed.



12/17/2001 - Charitable Contributions

Charitable Contributions deductions should be set up for only one calendar year. Remember to enter a Deduction End Date with all Charitable Contributions General Deductions. For the year 2002, the Deduction End date should be 01-01-2003.

12/14/2001 - Action/Reason Manual

The Action/Reason Manual has been revised and updated. All currently active codes are now included and a listing of inactive codes has been added to the document. The manual may be viewed or downloaded from HRMS, Human Resources, Action Reason Codes.

If you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

12/14/2001 - New HR panel

Effective Monday, December 17, 2001 a new panel will be available in the Administer Workforce (U.S.) module. This panel will enable users to maintain data regarding employee language capability. Data elements include Language, Native, Ability to Translate and proficiency in speaking, reading and/or writing.

Business Process HR0565 - Languages will be added to the Phoenix Web Site to document the proper use of the panel. The navigation path for the new panel is Administer Workforce (U.S.), Use, Languages.

If you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

12/14/2001 - Deferred Compensation 2002

The "Economic Growth and Tax Relief Reconciliation Act of 2001" has triggered changes that have required the Savings Plans panel to be updated effective January 01, 2002.

As many of you already know, the original panel was created allowing only one Savings Plan to be active at any specified time. One of the many changes to the panel is to provide the ability of an employee to participate in numerous Savings Plans at one time. To accommodate this change, the "Savings Plans" Panel has been modified to include four (4) Savings Plan types and to allow any or all of the plan types to be active at the same time. (Under each Savings Plan there are several Benefit Plan options. One Benefit Plan (for each Saving Plan selected) must be selected from the drop-down. Those Savings Plan types are: Standard 401(K) [the plan type code is "401(K)"]

Standard 457 [the plan type code is "457"]

401(K) Make-Up [the plan type code is "401(K)MU"]

457 Make-Up [the plan type code is "457MU"].

Records dated prior to Jan. 01, 2002 will appear under the old Savings Plan Type, which was simply "Savings".

Plan types "401(K) Make-Up" and "457 Make-Up" are to be used only for employees who are making up missed contributions due to military service, which must be approved by the Merit System. "457 Catch-Up" is a different feature of the law and is a Benefit Plan option under the "457" Saving Plan Type. (For an explanation of these and other

features of Deferred Compensation, contact the Merit System. The phone number and E-Mail address are given below.)

To assist with this change, Phoenix will be processing a conversion on the evening of December 27, 2001, which will move all active Savings Plan participants into their correct 2002 "Plan Types" and "Benefit Plans". This process will build a new row, effective 01-01-2002, for those participants who are currently deferring into a Savings Plan, if there is no future dated row. Employees with future dated rows in Savings Plans will appear on the conversion error report and will not be processed. These employees' records must be converted manually by the individual agency. Do not enter any rows in the Savings Plans panel with an effective date of 01-01-2002 or later until after the conversion has processed.

The Business Processes, located on the Phoenix web site, will be updated by the time of the conversion to assist users in using the new panels. Please be sure to review these new procedures prior to making entries.

We have also designed the following two new reports:

Deduction Balance for Deferred Compensation. (BNxxx024X):

The Deduction Balance Report will list all participants who have contributed to more than one Benefit Plan under a specified Savings Plan Type during the current Calendar Year. (i.e.: If a participant began the year deferring into 457 and in June changes to 457CU, both plan deduction balances will appear along with a total deduction balance combining the two.) Agency personnel will be able to use this report to maintain a current balance of a participant's Savings Plan total deduction amount, if Benefit Plans change during the year. It is the responsibility of the agency to prevent an over-deferral for a Savings Plan, the system is not able to do this. This report will process on the last day of each month, beginning January 2002.

Age 50+ Deferred Compensation Report (BNxxx023X):

The Age 50+ Report will supply the names of all current participants in either the GA401K Savings Plan or the GA 457 Savings Plan who will be eligible for the corresponding 50+ Benefit Plans in the following year. Those employees are required to be moved to the 50+ Benefit Plan of their Savings Plan if the employee will be 50 years of age (or more) at any time during the calendar year. (There is an exception to this general rule if an employee wants both 401(K) and 457 CU. See the Merit System regulations for details of the age requirement and exception.) This report will run (beginning next year) on December 7th and the first business day following Jan. 4th (January 6, 2003). The report processed on Dec. 7th will list those who are eligible for the 50+ Benefit Plan in the following year and can be considered a preliminary list of those employees who must be changed. The report processed in January will list those employees who have not yet been converted to the 50+ Benefit Plan, but should be. It is the responsibility of the agency to enter an election of the 50+ Benefit Plan for the employee, if the employee wants to continue the deferral. (Employees who are currently

active 401(K) or 457, will be moved into the correct option, based on age, during the conversion process.)

To obtain information regarding the new regulations, procedures, plans or forms for the 2002 Savings Plans, please contact the Deferred Compensation unit of the Georgia Merit System at (404) 651-6088 or see the Merit System web site http://www.gms.state.ga.us. For information on how to make entries into Phoenix HRMS, contact the Phoenix Customer Support section (the Help Desk) at (404) 657-3956 or by email at gtahrms@gta.ga.gov.

11/29/2001 - Account Code and Department Budget Tables

After a review of the number and types of correction requests pertaining to the Account Code and Department Budget Tables, the Phoenix Project Team will be implementing the following change as of December 3, 2001.

Currently, when adding new data to these tables or inserting a row to update existing data, the effective date defaults to the current date (commonly called the system date). In the future the Effective Date field will be blank, forcing agency personnel to enter a date before the transaction can be saved. When inserting a row to update existing data, the effective date entered will need to be greater than the date on the current row of data.

While this change will greatly reduce errors, agency personnel must remain mindful of the appropriate date to use and the appropriate time to make the system entry to ensure that personal services funding flows through to Financials correctly.

If you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

11/27/2001 - New Position Data Panel

In response to suggestions and recommendations expressed during Phase I of the workforce planning effort statewide, the Georgia Merit System has requested the creation of a new panel under Position Data called "WFP Business Func" to record Business Function data as identified during the strategic planning process.

There must be data in the field on this new panel in order to save an action on Position Data. For agencies which are not participating in Workforce Planning, or which have not completed the determination/assignment of Business Functions, the field should be completed with "N/A". Please review and adjust your internal processes to accommodate this entry as necessary.

All Business Functions that were assigned to agency positions in last year's strategic plan have been uploaded to Phoenix HRMS. Positions created after completion of last year's strategic plan, or positions that did not receive a Business Function assignment last year, have an "N/A" loaded in this field.

With the addition of this panel and data, the process of manually assigning and adding Business Functions to query data for the purposes of the Workforce Plan will no longer be necessary. Business Function data will automatically be included in the relevant queries discussed below. However, for the positions coded as N/A (those created after completion of last year's strategic plan, or positions that did not receive a Business Function assignment last year), the Business Function will need to be updated on Position Data before running the queries for this year's plan. This can be accomplished manually for day-to-day adjustments. If extensive or mass entry is required, it can be accomplished through the creation of a separate spreadsheet matching position to Business Function, which is then imported into Phoenix HRMS (contact the Workforce Planning Unit of the Georgia Merit System for details of this option).

Access to the WFP Business Func panel has been assigned to the following operator security classes:

MAHRPCA1, MAHRPM1, MAHRVHR1, MAHRVHR3

NEW WORKFORCE PLANNING QUERIES

As announced at the Phoenix User's group meeting, a number of new queries have been added to the HR QUERY database to support agency workforce planning efforts. These new WFP queries contain the new Business Function data, and exclude extraneous data not appropriate for workforce planning purposes. The Query List available from the Phoenix Web Site has been updated to reflect all the changes and to assure the accuracy of the information provided in the List.

0WP001_Current_Employee_Data

This query provides, for current employees only, all related data that is appropriate for purposes of workforce planning, including Business Function and other position-related

information, diversity characteristics, and tenure. Selection may be made for specified jobs or DeptID's. The following data fields are returned by the query:

Name, Empl ID, Job Family, Job Code, Job Code Descr, Position, FLSA Status, SCOA Type, Class/Uncl, Age, Ethnic Group, Gender, Tenure, Std Hours/Wk, Sal Plan, Grade, Annual Rt, Rating, Pay Group, Mail Drop, Location, Business Function, Posn County, DeptID, Dept Descr, Co.

0WP002_WF_Turnover_Actions

This query provides, for all employees that left agency service during the planning period, all related data for purposes of workforce planning. In addition to the data reported in the Current_Employee_Data query, this query also includes the termination action and the reason for termination. The following data fields are returned by the query: Name, EmplD, Job Family, Business Function, Job Code, Job Code Descr, Position, FLSA Status, SCOA Type, Class/Uncl, Age, Ethnic Group, Gender, Tenure, Std Hours/Wk, Sal Plan, Grade, Annual Rt, Rating, Action, Reason, Action Dt, Mail Drop, Location, Posn County, DeptID, Dept Descr, Co.

0WP003_Employee_Data_As-of-Dt

This query provides a listing of all those employed in the agency as of a specified date. The date entered will generally be the beginning of the strategic planning period. This data can then be compared against data reported in WF_Turnover_Actions for the purpose of calculating turnover percentages in support of workforce planning. The following data fields are returned by the query:

Name, Empl ID, Position, DeptID, DeptID Descr, Job Code, JobCd Descr, Annual Rt.

Should you have any questions regarding Business Functions and the creation of this new Position Data panel, please contact the Workforce Planning Unit of the Georgia Merit System at 404-656-2720. For questions regarding any technical problems with its use, please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

11/21/2001 - Payroll Run Calendars and HRMS Timing Schedules

Payroll Run Calendars and HRMS Timing Schedules for the first quarter of 2002 are available under HRMS, Calendars, First Quarter.

11/08/2001 - Blank Effective Dates

The Phoenix Project Team has recently reviewed the number and types of requests for correction assistance routinely received by the Agency Support Desk. As a result of that review and discussion with the Phoenix HRMS Customer Advisory Group of the State Council for Personnel Administration, the following change will be implemented effective November 13, 2001.

When inserting a row to complete a new transaction in Job Data, Position Data, Pensionable Earnings, Hire or Transfer/Rehire, the Effective Date field currently defaults to the current date (sometimes referred to as "system date"). With this change, the Effective Date field will be blank. The field is a "required" field and a valid value must be entered before the user can proceed to any other part of the transaction being entered.

It is hoped that this new functionality will greatly reduce the number of incorrect transactions currently being generated when users fail to change the date originally displayed in the Effective Date field.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

11/06/2001 - Data Center Drop Points

The Georgia Technology Authority Announces Changes at Trinity Washington & The Towers Data Center Drop Points:

There will be changes occurring with both the Trinity Washington (T/W) and The Towers Drop Points.

Beginning December 1, 2001, the T/W Drop Point will no longer be available. Some other options to use are:

The Towers Drop Point

Archives Print Facility

DOAS Courier (see note 1 below)

Beginning April 1, 2002, the Towers Drop Point will no longer be available. Some other options to use are:

Archives Print Facility

ViewDirect/Infopac (see note 2 below)

DOAS Courier (see note 1 below)

New Hours for the T/W & Towers Drop Points Beginning Monday October 29, 2001, new operating hours go into effect for T/W and Towers Drop Points:

T/W Drop Point: 6:30am-3:30pm.

Towers Drop Point will be: 6:30am-09:30am & 2:00pm-5:00pm

For more information about using DOAS Courier services, please contact either Stacy Lockitt at 404-656-5522 or Angela Stone at 404-656-5931.

For more information about using Viewdirect/Infopac, please contact either John Crowthers via email at jhcrowth@gta.ga.gov or voice at 404-651-9742 or Bob Kleid via email at bkleid@gta.ga.gov or voice at 404-657-8296.

Any questions regarding these changes please call Bob Russell at 404-656-7334, Mark Brown at 404-463-2528 or James Williams at 404-656-7315.

10/30/2001 - New Report - Pay Voucher

Effective November 1, 2001, a new report called Pay Voucher (Document Direct Report ID: PYxxx0003V) will be automatically generated on a daily basis. This report will be a replica of the pay stub for all confirmed checks that are printed during our nightly

processing. This includes all printed Off-Cycle checks as well as On-Cycle pay checks and direct deposit vouchers.

The report has been setup for online viewing purposes only and will be retained for 5 years. In addition, it has been added to the list of reports that are generated on the CDROM file.

10/18/2001 - New and Modified Queries

A number of new queries have been added to the Query List in the Query database, and modifications have been made to several existing queries. You may get a full listing of queries for each of the HR modules by checking the Queries listing under Human Resources, Benefits, and Payroll below the HRMS heading.

NEW QUERIES

0HR028 Job Code Originator Co

The query provides data for a specific Job Code, a listing of Job Codes by Pay Grade, or by Originating Company. The following data fields are returned by the query: Job Code, Job Code Descr, Job Family, Sal Plan, Grade, Step, Min/Annual, Max/Annual, EEO-4 Cat, Orig Co

0HR029 EE Gender Count

The query provides total count of Female and Male employees by Company. The following data fields are returned by the query: Co, Gender, Count.

0HR080_GEMS_Posn_History

The query provides position data from the GEMS legacy system. Selection may be made for a specified date range by Company, Organization and/or Position Number. The following data fields are returned by the query: Position, Last Action Dt, Action Code, Legacy Pos Nbr, Job Code, Job Code Descr, Grade, County Code, Cnty Code Descr, Action Cd Descr, FLSA Stat, Union Code, Util Pct, Class Inc Allwd, Position Status, Posn Stat Descr, Vacant Date, Org Nbr, Co

0HR081_GEMS_Perf_Rating_Hist

The query provides performance evaluation data from the GEMS legacy system. Selection may be made for a specified date range by Company or specified Empl ID. The following data fields are returned by the query: Empl ID, Name, Date, Rating, Term & Cond, Job Code, Co

0HR082_GEMS_Training_History

The query provides training data from the GEMS legacy system. Selection is made for a specified Empl ID. The following data fields are returned by the query: Empl ID, Name, Date Completed, Course, Title, Status Code, Student Hrs, Unit, Locality, Dept Empl By, Co

0HR083_GEMS_Work_History

The query provides employment data from the GEMS legacy system. Selection may be made for a specified date range by Company, Organization and/or specified Empl ID. The following data fields are returned by the query: Empl ID, Name, Auth Eff Dt, Auth Cd 1, Auth Cd 2, Auth Cd 3, Pay Grade, Pay Step, Pos Nbr, Emp Status, Time Status, Pay Plan, Class Nbr, Class Nbr Descr, Org Nbr, Status, Rehire Cd, Hrs Out Pay, Chk Loc Cd, Co

0BN021_Emp_Zero_Rcrd_W/O_ERS/TRS

The query provides a listing of all active employees on the Zero employment record who are not currently assigned to an ERS or TRS pension plan. Selection is by Department. The following data fields are returned by the query: Name, Empl ID, Pension Plan, Contribution Gp, Term Plan, DeptID

0PY031 Retirement/FICA Mismatch

The query provides a listing of employees whose FICA Status is incorrect for the type of Retirement Plan the employee is enrolled in. Selection is by Company. The following data fields are returned by the query: Co, Empl ID, Empl Rcd#, Name, Plan Typ, Plan, Benefit #, Pay Group, FICA Status

0PY051 FY Earnings For OT Adj

The query provides a list of Pay Earnings data for a specified employee. The data includes checks received from all companies the employee worked for during a specified fiscal year. Selection is by Empl ID, Employment Rcd Nbr, and Fiscal Year. The following data fields are returned by the query: Co, Pay Group, Pay End Date, Off Cycle,

Page, Line #, Addl #, Sep Chk #, Empl ID, Empl Rcd#, Name, Check Dt, Dept ID, Job Code, Hrly Rate, Reg Hrs Code, Reg Hours, Hrly Earns, OT Earn Code, OT Hrs, OT Earns, Reg Earn Code, Reg Hrs, Reg Earns

0PY052_FY_Oth_Earns_For_OT_Adj

The query provides a list of Pay Other Earnings data for a specified employee. The data includes checks received from all companies the employee worked for during a specified fiscal year. Selection is by Empl ID, Employment Rcd Nbr, and Fiscal Year. The following data fields are returned by the query: Co, Pay Group, Pay End Date, Off Cycle, Page, Line #, Addl #, Sep Chk #, Empl ID, Empl Rcd#, Name, Check Dt, Dept ID, Job Code, Hrly Rate, Earn Code, Oth Hrs, Oth Earns

0PY101_Emp_W/Bonus_&_Overtime

The query provides a listing of employees who have a BNA (Bonus - Performance Based) Additional Pay earnings code for a specified effective date and received Overtime Earnings for a specified fiscal year (at any Company). Selection is by Company, BNA Effective Date, Overtime Fiscal Year. The following data fields are returned by the query: Co, Empl ID, Empl Rec#, Name, Job Code, Dept ID, Oth Py

MODIFIED QUERIES

0HR020_Employees_Below_Minimum

Previously titled Employees_Below_Target. The following data field has been added to the query: Empl Status

0BN005_Leave_Balance_Snapshot Selection options are now DeptID, From Month-Year, To Month-Year, and Empl ID. The month and year fields need to have the numeric month (ie: 01 = Jan.) and a complete year (ie: 2001). The following data field has been added to the query return: Plan Type Description

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

Bi-annually, the Georgia Merit System compiles employee demographic information and forwards that information to the federal government. This year, the necessary information was generated using a report provided by PeopleSoft.

During the process of modifying the delivered report to appropriately summarize and display Georgia government information, it was determined that a company specific version might be helpful to Phoenix System users.

Accordingly, the report has been made available to any user that possesses security access to HR reports. The title of the report is EEO-4 State Government Information. The navigation path is:

Administer Workforce => Administer Workforce (U.S.) =>Report => EEO4 by Company

The Report Request Parameters are Calendar Year and Company. The data returned will reflect the workforce statistics as of June 30 of the input Calendar Year. The demographic information is displayed by salary range and is divided into the categories of full-time employees, other than full-time employees, and new hires. The report is accessible through Document Direct.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

10/03/2001 - Query Database Refresh

Each weekend the Phoenix HRMS Query Database (HRQUERY) is refreshed with data from the production database. Currently, transactions entered in the production database are not available in the query database until the following Monday. In an effort to reduce this delay, an additional refresh of HRQUERY will be scheduled for Wednesday nights beginning October 3rd. Since the query database is not available while the refresh is running, the new schedule for accessing the query database is as follows:

Monday (7 am) until Wednesday (8 pm)

Thursday (7 am) until Friday (6 pm)

A new query will be available 10-01-01 to assist agencies in identifying employees whose overtime payments during Fiscal Year 2001 may need adjusting because of having received a one-time bonus payment for an "Exceeds" performance rating effective October 1, 2001; or upon return from leave of absence.

This query (0PY101_Emp_W/Bonus_&_Overtime) will provide a list of employees currently in your company who are receiving the BNA earnings code (Bonus - Performance Based) and who received overtime payments at any company during FY2001. The query requires input of the effective date of the BNA additional pay earnings code and the desired Fiscal Year to review employee paycheck data.

The following information may be useful in using Phoenix data in your research of an employee's regular and overtime hours. These queries should be used in the absence of complete and accurate timesheets.

The payroll query (0PY051_FY_Earnings_For_OT_Adj) will provide a list of all checks for a specified employee from all companies for a specified Fiscal Year. The data returned includes hours in pay status and amounts paid for regular hourly, salaried and overtime earnings.

The payroll query (0PY052_FY_Oth_Earns_For_OT_Adj) will provide a list of all checks for a specified employee from all companies for a specified Fiscal Year. The data returned includes hours and amounts paid for other supplemental earnings (could include regular, overtime and all other types of pay). Note: not all earnings types "other hours field" represents true hours. For example: the other hours field for RTO- Retroactive Adjustment may represent hours, days or be blank depending upon the type adjustment or the agency policy for data input.

In order to calculate true hours worked, you must take into consideration the following: Holiday hours

Leave taken hours

Administrative leave (Weather, emergency, etc.)

Pay Dock hours

Retro pay for additional hours worked or docked for prior pay periods

Straight time hours

The benefits query (0BN010_Leave_Taken) will provide a list of all leave taken for a specified time period for a specified employee.

For actually processing the payment to the employee, we have added a new earnings code OTR - OverTime Retro Adj (Amts Only). As indicated in the earnings code title, we have setup the code to process dollar amounts ONLY. Do not input any data in the hours field.

For questions regarding the payroll processing of the overtime adjustment, contact the Agency Support Help Desk at 404-657-3956 or 1-888-896-7771.

For your reference, open and print or save the memorandum from Merit System Commissioner Marjorie Young regarding Overtime Adjustment Resulting From Lump Sum Payment for Exceeding Expectations. Should you have questions about the FLSA requirements, please contact John Roach at 404-657-0358.

09/27/2001 - Payroll Reports

The following reports are scheduled to run over the weekend of 09-30-01: Unemployment Reports:

TXxxx0002 - Quarterly State Employee Wage Listing

TXxxx0004 - Multiple Worksite Report

TXxxx0810 - Ga Qtrly U/I Wage List

Remember, GTA creates the Unemployment tapes and is responsible for sending them to the Dept. of Labor and the Risk Management section of DOAS.

Additional reports running over the weekend:

TXxxx0010 - Quarterly Tax Summary - this report summarizes period-to-date income tax withheld, disability, FICA, and unemployment taxes.

TXxxx0100 - W-4 Exemptions Report - this report lists those employees who are exempt from federal tax withholding. They file more than 10 exemptions.

TXxxx0900 - W-2 Annual Reporting Error Listing

If you have any questions, please call the Phoenix Agency Support number at (404) 657-3956 or 1-888-896-7771.

09/21/2001 - Salary Increase Correction Guide

Open and print or save a Word doc outlining procedures for correcting employees' records who are eligible for October 1 salary increases. The salary increase processes will be run on Wednesday, Sept. 26.

This document will assist you in correcting the following categories of employees' records: Employees who were not processed (Page 1; non-Salary Planning Tool, see Page 11)

Employee Review Records (Page 9)

Employees who were processed with the incorrect increase or bonus amount(s) because of: an incorrect Job Code.

or Employee Review score, or

Salary Plan/Grade/Step (all on Page 11)

Employees who were processed but who should not have been processed (Page 11)

Additional Pay records, including One-Time payments (Page 11)

Pensionable Earnings Panel (PEP; Page x)

NOTE:These instructions are for correction entries made on or after October 1, 2001, and may not necessarily be appropriate if entering corrections on September 27, 28, or 29. During this brief period, users have "correction" access to future dated Job, Additional Pay and Pensionable Earnings rows. If assistance in entering corrections is needed during this period, please contact the Agency Support Desk.

09/19/2001 - Salary Increase Reports

A test of 10/01/01 salary increases has been conducted based upon data provided to the Phoenix team as of close of business on Friday, September 14, 2001. The reports generated by this test have been moved to production InfoPac and are now available for review.

Those agencies who uploaded data via the Salary Planning Tool or who made other arrangements for salary increases to be mass processed should review the data provided in the reports. The reports consist of an 'Exception' list and a 'Processed' list. The 'Exception' list may be useful by providing an opportunity to resolve discrepancies and enter any necessary corrections in Phoenix or the Salary Planning Tool by the final upload deadline of Friday, September 21, 2001.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

09/17/2001 - Oct. 1 Salary Increase Processing

Open and print or save a Word doc outlining procedures for the October 1 salary increase.

Payroll Run Calendars and HRMS Timing Schedules for the fourth quarter of 2001 are available under HRMS, Calendars, Fourth Quarter.

09/04/2001 - Testing of Salary Planning Tool October Increases

Preliminary testing of importing the Salary Planning Tool data into Phoenix and creating the appropriate Job Data, Employee Review, Additional Pay and Pensionable Earnings rows will be conducted the week of September 17, 2001.

We would prefer to run these tests with "real" data from the Salary Planning Tool, rather than test data. To assist us in this process, we request that you do a preliminary export of your Salary Planning Tool data and upload it to the Phoenix web site by close of business on September 14, 2001. (Instructions are in your user guide and on the Phoenix web site, or call the Salary Planning Tool Help Desk at 404-656-2720). Your data entry does not need to be complete for us to use your data, and this does not need to be your final upload. We do plan to run error and update reports on this preliminary data and distribute them through InfoPac/Document Direct. This will allow you to make any necessary corrections.

YOUR FINAL EXPORT AND UPLOAD OF SALARY PLANNING TOOL DATA MUST BE COMPLETED BY CLOSE OF BUSINESS FRIDAY, SEPTEMBER 21, 2001.

IMPORTANT INSTRUCTIONS BEFORE UPLOADING YOUR DATA: In preliminary testing there have been a few occurrences where agencies have uploaded LAST YEAR'S data instead of the current evaluations. This is possible if you did not completely delete all files during the uninstall of last year's version, or if you saved the data file to a different location.

As a precaution it is suggested that you search for last year's export file, the format of which is "U'agency#'.ZIP" (e.g., U401.ZIP), and delete it.

To find the file on your PC: Click (1) Start (2) Find/Search (3) Files or Folders (4) Type your file name (e.g., U401.ZIP in "Named" (5) Change "Look In" to the drive where you

think the file would be. The "Include subfolders" box should be checked. (6) Click "Find Now" (7) If the file name appears in the search window, right-click on the file, then choose "Delete".

Final testing and distribution of error and update reports will take place from September 21-September 25. The final salary update process in Phoenix is scheduled for the night of Wednesday, September 26th.

As an additional reminder, we recommend that agencies NOT process any transactions affecting employees' pay effective September 21 - October 1. Any transactions on or after September 21st will require calculating appropriate increases manually and creating a number of rows on different panels in Job Data, Employee Review, Additional Pay and Pensionable Earnings. This is an error-prone process and must be done only on or after October 1, 2001. Additionally, no future dated transactions effective October 1 or after which impact employees on the SWD, SRE, MD1 or other plans using the Salary Planning Tool should be entered into the Phoenix system until September 28th or later.

For assistance or questions concerning this information, please contact the Salary Planning Tool Help Desk at 404-656-2720.

08/25/2001 - Employee Position Budget Status Report

The following is effective Monday, August 27, 2001.

A new prompt field has been added to the Employee Position Budget Status Report (HRxxx031) to permit the report to be run by Department ID as well as company wide.

The new prompt field (DeptID) is optional and will accept the use of a wildcard (%) in any position of the field. This new prompt field will enable any user with reports access under Develop Workforce/Manage Positions to generate the Employee Position Budget Status Report for any portion of a company. Leaving the DeptID field blank and entering a value in the company prompt field will result in the report being generated for the entire company.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

The Crystal reports listed below are now available in the Phoenix HRMS system. Please review the document "Running Crystal Reports" for detailed instructions on how to run a Crystal Report Program. This document is located on the HRMS - Payroll - Reports page. If you use Citrix to access Phoenix, you can run these reports immediately. If you use a Native 3-tier connection to access Phoenix, you must have your LAN administrator load the programs to your agency's LAN before you will be able to run these reports. Instructions for LAN administrators are included below.

New Crystal Reports

Transaction Audit Report - (GO - Administer Workforce - Administer Workforce U.S. - Report - Transaction Audit Report) - This report lists all transactions entered by a specified operator in a specified date range, OR the identity of all operators who have entered transactions on a specified employee or position. Access to the report will be provided through the MAHREDR1 operator class. This report is extremely difficult to understand due to the nature of the audit information it accesses within the Phoenix HRMS database.

Calculated Deductions Report - (GO - Compensate Employees - Manage Payroll Process U.S. - Rpt A-M - Calculated Deductions Report) - This report lists all employees who have a specified deduction code on the current calculated on-cycle check. This report has been added to the MAPYPLM1 operator class.

Calculated Deductions Not Taken Report - (GO - Compensate Employees - Manage Payroll Process U.S. - Rpt A-M - Calculated Deduct Not Taken Report) - This report lists all employees who are missing one of their active deductions on the current calculated on-cycle check. This report has been added to the MAPYPLM1 operator class.

Revised Crystal Report

HRMS Operator Class Report - (GO - Security Reports - Report - Operator Class Report) - The report lists the panels and reports accessible for a specified operator class. This report is available through the MASECRPT operator class. Revisions were made to the report headings, not to the output of the report.

If you have problems running the reports, contact the Phoenix HRMS help desk at 404-657-3956 (local) or 888-896-7771 (long distance).

Citrix Users DO NOT need to read any further.

LAN Administrator Information

The following information pertains to Native 3-Tier users only. A technical resource will need to access the Phoenix FTP File Server to download the Crystal Reports before the reports can be run. Please direct your LAN Administrator or technical support person to

the document "Crystal FTP Instructions", on the HRMS - Payroll - Reports page. This document describes the process of obtaining the Crystal report files from the FTP server.

The following files must be downloaded from the FTP File Server and saved in your Crystal Reports directory on your LAN.
OHS017--.rpt - Transaction Audit Report

SEC001X.rpt - Operator Class Report

PAY009X.rpt - Calculated Deductions Report

PAY010X.rpt - Calculated Deductions Not Taken

If your technical staff encounters difficulties accessing the FTP server and/or downloading the reports, please send an email to DOASHRMS@doas.state.ga.us, or fax the information to 404-463-5089 and indicate that it is a Crystal download problem. This will assist us in getting your problem to someone who can help as quickly as possible.

07/16/2001 - Help Desk Support Change

Effective today, you'll find only one selection for HRMS on the Phoenix Help Desk Line. This change reflects the recent reorganization of that staff and will allow better coverage of the phones by the agency support staff.

07/12/2001 - HRMS Queries

A number of new queries have been added to the Query List in the Query Data Base and modifications have been made to several existing queries. The Query List available from the Phoenix Web Site has been updated to reflect all the changes and to assure the accuracy of the information provided in the List.

NEW QUERIES

0HR025_Employee_Hire_Actns

The query provides a listing of employees hired and transferred into a company during a specified time period. The Following data fields are returned by the query:

Name, Empl ID, Empl Rcd#, Eff Date, Empl Status, Job Family, Job Code, Job Code Descr, Position, FLSA Status, SCOA Type, Full/Part Time, Class/Uncl, Birthdate, Age, Ethnic Grp, Gender, Service Dt, Tenure, Std/Hrs Wk, Sal Plan, Grade, Step, Comp Freq, Annual Rt, Rating, Action, Reason, Action Dt, Mail Drop, Location, DeptID, Dept Descr, Co.

0HR026_Employee_Demographics

The query provides employee specific demographic and educational data. The following data fields are returned by the query:

Empl ID, Name, Hi Educ Level, Job Code, Job Title, DeptID, Dept Descr, Service Date, Tenure, Birthdate, Age Gender, Ethnic Grp, Full/Part Time.

0HR027_Frozen_Positions

The query provides a listing of positions selected by Position Status (Approved, Frozen, Pending). The following data fields are returned by the query:

DeptID, Dept Descr, Position, Position Status, Eff Status, Eff Date, Posn Head Count, Budgeted, Job Code, Job Code Descr, SCOA Type, Location, Class/Uncl, Std Hrs/Wk, FTE, Pay Group, FLSA Status, Mail Drop, Reports To, Sal Plan, Grade, Step

0PY018 Emp With Hours

The query provides a listing of employees for a specified range of pay periods who received hourly pay. The following fields are returned by the query:

Empl ID, Empl Rcd#, Name, Co, Pay Group, Pay End Date, Off Cycle, Position Nbr, Deptid, Dept Descr, Name, Reg Hrs Code, Reg Hrs, Hrly Earns

MODIFIED QUERIES

0HR002_Employee_Turnover_Actns

The query was not properly returning data on previous employees who had since been employed by another company. That problem has been corrected. Social Security Number has been deleted from data fields returned.

0HR005 EEO-4 Demographic Sumry

At the request of users the 0HR005 U.S. Labor Statistics query has been modified and renamed. EE0-4 Job Category has been added as the first level of grouping, and the query re-named "EEO-4 Demographic Sumry".

EEO-4 Job Category is defaulted from Job Code to the employee, and cannot be changed at that level. The majority of EEO-4 Job Categories were assigned to job codes during GeorgiaGain implementation. For agency-unique job codes, assignment of the proper code was, and remains, the responsibility of the originating agency. The Merit System assigns the codes for common job codes.

If you plan on using this query regularly, you may wish to review the EEO-4 Job Category codes assigned to your agency-unique job codes for correctness.

0PY015_Emp_With_Oth_Pay

The Prompt has been modified to allow for a range of pay periods.

0PY016_Emp_With_Overtime

The Prompt has been modified to allow for a range of pay periods.

0PY017_Emp_With_Deduction

The Prompt has been modified to allow for a range of pay periods.

0PY019_Emp_In_Additional_Pay

The FLSA status has been added to the data that the query returns.

0PY025_Emp_By_Maildrop

The Position Number has been added to the data that the query returns.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

07/11/2001 - 2001 Salary Planning Tool

The 2001 version of the Salary Planning Tool, employee data files and Salary Planning Tool User's Guide are now available for download from HRMS/Salary Planning tool.

The Salary Planning Tool will be used for processing October salary increases for agencies using the SWD, SRE, MD1, GTA, GCI and 977 salary plans.

Downloading the Salary Planning Tool and employee data requires an Agency ID and Password. These IDs and Passwords will be distributed during the user training sessions being held the week of July 9th. If your agency is not attending the training, contact the Salary Planning Help Desk at 404-656-2720 to obtain access to the software and data. You may also call that number for any other information or assistance regarding the Salary Planning Tool.

This year the employee data files will be updated over each weekend, and available Monday morning. Large agencies with a lot of HR activity may wish to refresh their Salary Planning Tool data on that same schedule. Smaller agencies, or those with little activity, may only need to apply the refresh once or twice during the evaluation period, if at all.

It is anticipated that agencies will do a test upload of their Salary Planning Tool data to Phoenix on September 14th; to allow testing of the increase processing. The final upload of agency data is expected to be close of business on September 21st. Additional information will be provided as these dates are finalized.

06/28/2001 - Personal Services Projection Parameters for FY2002

Please distribute the Personal Services Projection Parameters for FY2002.

06/12/2001 - New Retirement Rates for Budget Projections

The retirement percentages for the Next Fiscal Year on the Personal Services Projection have been modified to reflect the new rates effective 07/01/01. The rates for the Current Fiscal Year will remain at the old values until we confirm the last payroll for June. After the 06/30/01 payroll confirm, the new retirement rates will be in effect for both Current and Next Fiscal Years on the projection.

06/12/2001 - Pension Monthly Reporting Panels

The following change will be effective June 13, 2001:

This communication is to provide an overview of the newly implemented Pension Monthly Reporting Panels to assist both statewide and non-statewide agencies with monthly reporting of retirement contributions and earnings.

Under Administer Pension Plan, four new panels have been added to assist agencies in the reporting and processing of their monthly retirement data. The member contribution and earnings data reported to Pensions should always match the contribution and earnings payroll data. Using the Payroll Comparison Report (provided monthly for agencies on statewide payroll) and the panels described below, agencies can reconcile the data that will be reported to Pensions to their payroll data. If any discrepancy is identified, this should prompt the agency to locate the member record(s) that is incorrect and make the necessary corrections to achieve a monthly balance.

Monthly Reporting Agency Data

View Agency Plan Totals Panel provides plan totals of the data that will be transmitted to Pensions, sorted by plan for each agency for a specific reporting month. Projected Remittance to ERS represents the total amount of the Employee Contribution, Employer Pickup and Employer Contributions. The Transfer Retirement Data switch is defaulted to automatically transfer the data to be loaded to Pension tables by the 20th business day of each month. This switch can be turned 'off' to prevent a transfer of data, if for instance an agency identifies an incorrect record. The record can now be corrected by the agency online using the Maintain Member Data Panel. Once corrected, the agency will need to return to this panel to reset the switch back to 'on'. Once a transfer has taken place the data will automatically be greyed out to prevent any further changes. If data changes are necessary following the transfer, this would require the completion of a 2A.

View Agency Plan Members provides a view of all plan members within an agency. Months of Service for each member, is determined by dividing the salary by the full time equivalent salary for that particular month.

Monthly Reporting Member Data

Maintain Member Data provides individual member retirement contribution records for each month that has been reported for the current fiscal year. Corrections can be made directly to the member data via this panel prior to the files being uploaded to ERS. As a reminder, maintaining correct PNA is very important in keeping records correct.

View Member Totals provides a total of each members reported contributions and earnings for a specific fiscal year.

Beginning in July, the Consolidation process will run following the monthly payroll confirm for each agency. The edit process for statewide agencies will also run during this time on a monthly basis. The non-statewide edits are completed the night of the day the file is received. Agencies can view edit results via Document Direct.

06/12/2001 - Payroll Warning Report

The Payroll Warning Message Report (PYxxx0541) has been modified to include three new messages.

The first message is for employees who are enrolled in Georgia Defined Contribution Plan and have a FICA Status of 'Subject' or 'Exempt'. The message that will appear on the report is as follows: Employee in GDCP with FICA Status as 'Subject' or 'Exempt'.

The second message is for employees who are enrolled in Employees Retirement System and have a FICA Status of 'Medicare Only' or 'Exempt'. The message that will appear on

the report is as follows: Employee in ERS with FICA Status as 'Medicare Only' or 'Exempt'.

The third new message is for employees that are enrolled in Teachers Retirement System and have a FICA Status of 'Subject' or 'Exempt'. The message that will appear on the report is as follows: Employee in TRS with FICA Status as 'Subject' or 'Exempt'.

If an employee is in the incorrect FICA Status, a determination must be made as to what FICA Status the employee should have. Once a determination has been made, a correction must be made on Job Data 2 using the correct effective date. If possible, add another Effective Sequence dated row to the Job Data row that caused this error. If you can not insert a higher effective sequence row, you will need to send in a correction request to the HRMS Agency Support Helpdesk. If OASDI Tax has been withheld in error due to the incorrect status, a Reversal/Adjustment attached to the correct year will need to be processed for each incorrect check the tax was withheld. If OASDI or Medicare Tax has not been withheld, the agency will need to contact Tim King at 404 656-4959 or e-mail teking@doas.state.ga.us and proper resolution will be determined on a case-by-case basis. This will ensure proper W-2 data being reported at year-end.

If an employee is enrolled in the incorrect Retirement Plan, a correction must be made on the Pensionable Earnings Panel. If the error is on the current row, insert row using the next day and make the appropriate adjustment. If the error is on a history row you will need to send in a correction request to the HRMS Agency Support Helpdesk. Once a correction has been made, any deduction differences due to plan changes must be corrected on the employees Payline. If you have any questions please call the HRMS Agency Support Helpdesk at 404 657-3956.

06/12/2001 - Payroll Run Calendars and HRMS Timing Schedules

Into a Word doc, download the HRMS timing schedule for the third calendar quarter of 2001. The Excel file contains the calendars showing scheduled payroll runs.

06/11/2001 - New Earnings Code Structure

Effective July 1, 2001, we will be converting Earnings Codes 101 through 501 to a new code structure. The new structure was recommended by the HRMS/Payroll Advisory

Group to assist with updating new Additional Pay rates effective with the October 1, 2001 salary increases. Several of the existing earnings codes within this range allowed different percentages of base salary or dollar amounts to be paid as a supplement. These different percentages required manual adjustment each October. By separating a single code into multiple levels (one for each percentage or dollar amount), the Mass Additional Pay change program will be able to process most of the employees receiving Additional Pay. The request also included grouping the new codes based on Job Family for easier access and to modify the title to be more descriptive.

Download an Excel spreadsheet listing the codes to be converted and in some cases codes to be abolished.

We will automatically handle the conversion of employees with Additional Pay from the old code to the new for all codes in a One-to-One conversion category. However, for codes that are in a One-to-Many conversion category, we will be providing your agency with a listing of employees for you to identify which new code they should be converted to. Please contact Sylvia Silas (sjsilas@doas.state.ga.us) with the name and email address of the person who should receive this listing.

For those earnings that are paid on a pay period by pay period basis (either with Rapid Data Entry or directly on the PayLine), please instruct your staff to use only the new codes starting with the first pay period of July.

Special Note: Most PeopleSoft panels will not display the old earnings codes using the drop down arrow once the code is deactivated, however they will allow you to type in the earning code (for example-Rapid Pay Data Entry). During the payroll calculation process, an error message will be displayed stating "The Earnings Code specified is not found in the Earnings Program" if an old code has been used. To correct the error, access the PayLine and change the earnings code to the correct new code and save the panel.

These Earnings Codes are based on the Georgia Merit System Addenda to the Compensation Plan which can be accessed at the Georgia Merit System Web Site (www.gms.state.ga.us). Use navigation path: Agency Services, Policy and Rules, Policies, Addenda to Compensation Plan.

06/08/2001 - Nightly Payroll Calculations

The Nightly Payroll Calculations did not run last night due to a PeopleSoft Tax Update migration problem. They are being run this morning and the reports should be available in Infopac/Document Direct by noon.

If you need any further assistance or clarification, please contact the HRMS Agency Support Helpdesk at (404) 657-3956.

06/08/2001 - Change to Position Data 1 Panel

The following change will be effective Monday, June 11, 2001.

In conjunction with the Phoenix HRMS Customer Advisory Group, the Phoenix Project Team implemented changes to the Position Data 1 Panel. Sal Plan/Grade/Step will no longer be displayed in the lower left corner of this panel.

This field was only updated when a transaction was entered on a position. No update occurred if a change was made to the salary plan or grade of the Job Code to which the position was assigned. Lack of position updating when Job Code was changed frequently resulted in employees and managers being provided incorrect information regarding the pay grade and salary range assigned to a given position.

Two solutions were determined as possible resolutions to the Position/Job Code disparity. One solution was to create a central process that would update position records when Job Code data was changed. This solution necessitated the creation of a Position Data row with the same effective date as the change to Job Code. The disadvantage to this solution was this creation of Position Data rows which might interfere with other position activity desired by an agency. For example: A Job Code was assigned to a higher pay grade effective August 1, 2001 and a Position Data row was created to reflect the change. An agency, however, wished, effective August 1, 2001, to reallocate a position assigned to that Job Code. Due to a lack of an Effective Sequence Number on the Position Data Panel Group, both actions could not be effective the same date.

The second solution was to eliminate the display of Salary Plan, Grade, and Step from the Position Data 1 Panel. The advantage of this solution was the elimination of potentially inaccurate information from the panel. The disadvantage was the necessity of accessing the Job Code Table to secure information regarding the pay grade to which a position is allocated.

The Customer Advisory Group and the Phoenix Team determined that the better of the two solutions was to eliminate the display from the Position Data 1 Panel and thus reduce the likelihood of interfering with normal position activity.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

06/05/2001 - Paycheck info in PACS

Download a Word document describing new panels that have been created in Phoenix HRMS to display pay check information from the PACS system. If your Operator ID in Phoenix includes either security class MAPYPLM1 (Payroll - Payline Maintenance) or MAPYVPY1 (View Only Access Payroll Data) you should be able to access the panels immediately.

05/31/2001 - Paycheck and Direct Deposit Advice

Effective today, the paycheck and direct deposit advice will be modified by adding a Sequence Number on the face of the form. The sequence number is presently printed in the bar code on the outside of the folded pay voucher and is a numerical identifier of consecutively printed forms. The sequence number will not be retained in the Phoenix database. This modification has been requested by the Operations Staff of the Towers Computer Center (TCC) in order to enhance the tracking of checks printed by the TCC.

05/29/2001 - FLEX to Phoenix Update for 05-25-2001

Open Enrollment Update from FLEX to Phoenix HRMS - May 25, 2001

The Flexible Benefit Program options entered in the FLEX system for the new Plan Year will be updated in the Phoenix HRMS system after the close of business on Friday, May 25, 2001. As a result of the interface process, the Phoenix system will produce two reports to assist agencies - "Open Enrollment Update Report" (BNXXX05L7) and "Open Enrollment Exception Report" (BNXXX05M7). A third report ("Multiple General Deduction Error Report" BNXXX0557) will be generated shortly after the Open Enrollment process, sometime around May 30th. The purpose of this memorandum is to describe the update process and the related reports.

Open Enrollment Update Report - BNXXX05L7

If an employee's new Plan Year benefit options were entered correctly in FLEX under the correct Social Security Number (SSN), corresponding General Deductions will be updated in Phoenix (if the employee exists in Phoenix under the same SSN). If an employee elected a new option (e.g., life insurance at 4Xpay before-tax), the new

deduction code (XLF4XB) will be set-up in Phoenix. The Effective Date of the new deduction will depend on the employee's company and pay group. Most employees' new options will reflect an Effective Date of June 1, 2001. However, if the company is 427, pay group SH2 or if the company is 462, pay group SH2, the Effective Date will be May 16th. Also, if the company is 922, pay group WH1, the Effective Date will be May 21st.

If an employee has elected to stop a benefit in FLEX, the General Deduction panel will be updated to reflect a Deduction End Date for the option. The actual Deduction End Date will follow the same pattern as the Effective Date (i.e., based on company and pay group).

Report BNXXX05L7 (where XXX is the company number) "Open Enrollment Update Report" reflects those employees who updated to the Phoenix General Deduction panel. This report will include:

Department ID

Employee name

Employee ID

Employment record #

Option Effective Date

Option Deduction Code

Option deduction amount (this will be blank if the option was stopped), and

The message "Option Stopped" if the option is being stopped.

Open Enrollment Exception Report - BNXXX05M7

In some situations, an employee's benefit options may not update from FLEX to Phoenix. Employees will appear on this report for two reasons. First, if the employee's Phoenix HR status is terminated, the employee will appear with the message, "Terminated employee in Phoenix system." Second, if in the FLEX system a deduction has been stopped that does not exist in Phoenix, the employee will appear on this report with the message, "Trying to stop a deduction that does not exist."

Report BNXXX05M7 (where XXX is the company number) "Open Enrollment Exception Report" for the company will include: Department ID

Employee name

Employee ID

Employment record #

Option Effective Date

Option Deduction Code

Option deduction amount (this will be blank if trying to stop a deduction that does not exist), and

One of the two exception messages described above.

Multiple General Deduction Error Report - BNXXX577

For some employees, multiple deductions are being made in the Phoenix system for the same type or category of benefits. For example, an employee may have more than one type of long term disability insurance on the General Deduction panel. Active payroll deductions are occurring for more than one option. This would occur if the company user entered an option incorrectly in Phoenix (e.g., XLT+RS) while also entering the option correctly in FLEX (e.g., XLT-RS). The correct option may be reflected in both the FLEX and Phoenix systems. However, an additional incorrect option is also active in the Phoenix system.

Report BNXXX0577, Multiple General Deduction Error Report will reflect those employees falling into this category. The report is intended to assist the company in determining which General Deduction code is valid and which one should be stopped. The company is to turn-off the incorrect General Deduction code in Phoenix. Retroactive payroll adjustments may be necessary to refund additional/incorrect deductions to the employee. If necessary, updates to the FLEX system should be completed as well.

Please refer to the applicable business processes including BEN 0550 Benefit Deduction Adjustments and PAY 208 Entering One-time Deductions.

General Information

If your company does not complete entry of Open Enrollment Option Statements in the FLEX system prior to the end of business Friday, May 25, 2001, those employees who were not entered will not be updated in the Phoenix system by this process. However, once the entry is completed in the FLEX system after May 25, 2001, the nightly interface will update the Phoenix system. Roll-over Option Statements will be updated in Phoenix during the update process on May 25, 2001.

As always, should you have any questions regarding the Phoenix system, contact your Agency Support representative. Questions about the FLEX system should be addressed to the Georgia Merit System.

05/22/2001 - Department/Budget Table Information

In preparation for the new fiscal year, the HRMS Central Office will be running two processes that affect the Department Budget Table. Please note that the dates have changed from what was given out in the BDZ003 class.

CLEAN-UP PROCESS

On May 29th, the HRMS Central Office will run a process that will clean up the Department Budget Table for those departments (organizations) that have 4 or more rows of data in the table.

The process will retain the earliest effective dated row and the two most current rows of data. The clean-up process will eliminate the time-out problem that a few agencies have experienced due to excessive rows of data in the Department Budget Table.

COPY PROCESS

On May 30th, a process will be run that inserts a future dated row for 7/1/2001 in the Department Budget Table, copying the current row of data to the 7/1/2001 row for the new fiscal year. Users will be able to change the data on the 7/1/2001 row of data in the Department Budget Table prior to the new fiscal year, if necessary.

FISCAL YEAR BUSINESS PROCESSES

Please refer to business processes HRB0820-BUDG or HRB0830-BUDG for updating the 07/01/01 future dated row or inserting a row prior to the future dated row, respectively.

All of the updated business processes for Account Codes/Budget Encumbrances are on the Phoenix web site. The naming convention for these business processes has changed from HRxxxx-BUDG to HRBxxxx-BUDG.

QUERIES

The following queries are available for printing data from the Account Code and Department Budget Tables: 0HR090 - Account Code Table

0HR091 - Department Budget Table

05/21/2001 - Bank Reconcilation

The monthly bank reconciliation report has been delayed due to a bank interface problem. The bank reconciliation process is run only after all banks have reported the previous month's cleared checks. One bank is having problems sending this file. We should receive the transmission soon. Look for the bank reconciliation report to run next week.

05/07/2001 - Guidelines for Transactions Effective Dates

Determining appropriate effective dates for Job, Pensionable Earnings, and Position transactions is critical to the correct usage of the Phoenix HRMS System. Proper date selection ensures accuracy of payroll calculation and the ability to create query results truly reflective of HR activity.

The Guidelines for Transaction Effective Dates has been created to augment the Phoenix System Action Reason Codes manual. The two documents should be used together to facilitate proper transaction entry.

Guidelines for Transaction Effective Dates provides instruction for determining appropriate effective dates for the most common types of Job, Pensionable Earnings, and Position transactions. Specific examples are provided to assist the user in properly applying the Guidelines to everyday transaction activity.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

05/04/2001 - Extension of Electronic Open Enrollment

The Electronic Open Enrollment website, www.gabenefits.org will now be available through midnight of May 15, 2001. Additionally, the HelpDesk function will be available through May 15.

As previously communicated, during the weekend of May 4, Confirmation Statements will be printed for entry that has been completed thus far through the website and Flex system (FBS2). Confirmation Statements will continue to print on a nightly basis

throughout May, 2001. It is highly recommended that Confirmation Statements be distributed to employees as soon as possible so that employees may review selections for accuracy.

04/27/2001 - Employee Review Audit Report

The following is effective immediately.

The Employee Review Audit Report (HRxxx008) is now available. The navigation path for this report is Go, Administer Workforce, Plan Salaries (GBL), Report, Employee Review Audit. Ability to run this report is limited to those operators who are assigned to the Security Class MAHREDR1.

The report returns only the most recent evaluation for each employee. Optional prompts are provided for Department, Mail Drop ID, Job Code and Summary Rating. Data returned includes Dept Id, Mail Drop, Empl ID, Empl Rcd#, Employee Name, Service Date, Job Code, Last Review, Reviewer ID, Reviewer Name, Eval Type, Summary Rating, Job Perf and Term Cond. Distribution is through InfoPac.

This report is delivered by PeopleSoft and is not intended to replace the functionality of the Salary Planning Tool provided by the Georgia Merit System. It has been made available only to provide an additional opportunity for users to access and review data regarding employee ratings.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

04/18/2001 - Employee Information Display Panel

The following change will be effective Tuesday, April 24, 2001:

In response to a request by the Phoenix HRMS Customer Advisory Group, the Phoenix Project Team implemented changes to the Job Summary Panel. These changes increased the amount of employee information provided by the panel and removed Company security from the panel. Accordingly, all users who have access to the Job Summary Panel are now able to view data on all employees in the system. The user, however, must have the correct EmplID or SSN. Name search capability is not available.

Since the Job Summary Panel now provides detailed employee information and is not restricted by Company level security, the functionality of the Employee Information

Display panel (found under Administer Workforce (U.S.), Use) is no longer necessary. The Employee Information Display Panel will, therefore, be eliminated from the Use Menu.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

04/11/2001 - Parking Rates Change Information

The Georgia Building Authority (GBA) has requested that GBA parking rates be changed due to Ozone Season starting May 1, 2001. Parking rates for deduction codes PRBGBA and PRKGBA will be changed to \$30 the night of Friday, April 13th. A report (PYxxx0560, 'Deduction Rate Change') listing all employees with these deductions will be distributed through Infopac and routed to your payroll office. The report will also show those employees whose rates were not changed by the program. Please review the report and take whatever action is needed for those employees who did not have their rates changed. If you have any questions please call the HRMS Helpdesk at 404 657-3956.

04/06/2001 - Refresh & Correction of Annual Benefits Base Rate (ABBR)

The Annual Benefits Base Rate for the upcoming FLEX Plan Year (2001-2002) was calculated after the close of business on April 5, 2001. It was calculated based on information that was in the Phoenix System at that time. The calculation used the "Annual Salary for Pension Administration" from the Pensionable Earnings Panel (for ERS and similar pension plans) or it used the "Annual Rate" from Job Data 3 (for TRS and Defined Contribution pension plans). The calculation used the dollar amounts that were in effect as of April 1, 2001.

The process which refreshes the Annual Benefits Base Rate (ABBR) built a Job Data row for each employee who is active or on leave of absence. The Action/Reason of the row is "Data Change/Refresh Annual Benefits Base Rt" and the effective date of the row is be April 1, 2001. For employees with certain circumstances in Job Data, the processing was slightly different. Employees who already had an April 1, 2001 Job Data row had the ABBR row added with the next higher effective sequence number in addition to the April 1, 2001 date.

Employees who already had a Job Data row (or rows) with an effective date later than April 1, 2001 had the April 1, 2001 ABBR row inserted in its proper place and the later

dated rows had their Annual Benefits Base Rate (on Job Data 3) changed to the newly calculated amount for Plan Year 2001-2001.

Employees who have been transferred out of one agency and not yet been transferred into another agency (their top Job Data row will have an Action/Reason of "XFR/OUT" and an Employee Status of "Leave of Absence") will not have an Annual Benefits Base Rate row built. Their top existing Job Data row will be updated with the new ABBR amount. (An ABBR row as the top Job Data row would prevent the employee from being transferred into the new agency via the Transfer/Rehire Panel.)

Correction of Annual Benefits Base Rate (ABBR)

If the data in Phoenix was not correct and up-to-date, the Annual Benefits Base Rate will not be correct. If you find that the Annual Benefits Base Rate for an employee needs to be corrected: (1) make the entry (or entries) that will correct the employee's data in Phoenix, (2) enter a Job Data row (use the action code of "Data Change" and the reason code of "Correct Annual Benefit Bast Rt" with an effective date of 04-01-2001) to correct the Annual Benefits Base Rate (make sure the ABBR amount on Job Data 3 is corrected), and (3) request a new Option Statement for the 2001-2002 Plan Year.

The following are the most common omissions or incorrect entries in Phoenix (and the corresponding correcting action) that may have caused the ABBR to be incorrect. A pay rate change effective April 1st or earlier was not entered by the time the Job Data row to Refresh the ABBR was built by the system. Correcting Action: Enter the missing action (if the effective date is prior to 04-01-2001, you must ask Agency Support to delete the 04-01-2001 Job Data row with the Action/Reason of "DTA/RBB") and enter the necessary PEP row. Then enter the Job Data row to correct the ABBR and request a new 2001-2002 Option Statement.

An Additional Pay which is Pension Eligible was not entered by the time the Job Data row to Refresh the ABBR was built by the system. Correcting Action: Enter the Payroll action to build the Additional Pay with the Pension Eligibility box checked and enter the new PEP row with the correct amount in the Monthly Additional Pay box. Then enter the Job Data row to correct the ABBR and request a new 2001-2002 Option Statement.

A pay rate change or an Additional Pay was entered but the corresponding PEP row was not entered. Correcting Action: Enter the correct PEP row. Then enter the Job Data row to correct the ABBR (use the effective date of 04-01-2001 with the next higher effective sequence) and request a new 2001-2002 Option Statement.

A pay rate change or an Additional Pay was entered for an incorrect amount. Correcting Action: For an Additional Pay, use Correction Mode to correct the amount of the Additional Pay; for a pay rate change, enter a Job Data row with the Action/Reason "Data Change/Correct Salary" to correct the Compensation Rate (if the effective date is prior to

04-01-2001, you must ask Agency Support to delete the 04-01-2001 Job Data row with the Action/Reason of "DTA/RBB). Enter a corrected Pensionable Earnings row using the next day as the effective date. Then enter the Job Data row to correct the ABBR and request a new 2001-2002 Option Statement.

There may be other circumstances that will require you to fix the ABBR. For assistance, call the Agency Support Section at (404) 657-3956 or FAX your request to (404) 463-5089.

04/05/2001 - Transfer/In Business Process - HR 0670

In response to a request by the Phoenix HRMS Customer Advisory Group, the Phoenix Project Team has implemented a change to the business process in which certain employees are transferred from company to company. New Reason Codes have been added to the Action type Transfer in order to accomplish this change.

Currently, actions which incorporate a combination of interagency transfer and promotion or demotion are not easily identifiable. To facilitate the accuracy of query results and Workforce Planning requirements, the Customer Advisory Group requested that new Reason Codes be created for the Action Code of Transfer (XFR). Accordingly the following Reason Codes are now available for reporting the transfer of an employee from one company to another: Transfer/IN - Lateral Xfer Frm Diffrnt Cmpny The Job Code of the employee's position in the new agency is assigned to the same pay grade as the employee's position in the old agency.

Transfer/PRO - Promotion

The Job Code of the employee's position in the new agency is assigned to a higher pay grade than the employee's position in the old agency.

Transfer/VDM - Voluntary Demotion

The Job Code of the employee's position in the new agency is assigned to a lower pay grade than the employee's position in the old agency.

In addition, a significant number of individuals have been included in the Phoenix database for pensions purposes only. These individuals are recorded with valid Employee

ID's with a Company indicator of NSW. The Transfer/Rehire function must be used to move any such individual into true 'employment' status. Transfer/HIR - Hire from NSW Use of this Reason Code will facilitate query results and Workforce Planning requirements, to accurately reflect 'Hires' from this group of individuals.

The four Reason Codes indicated above are now the ONLY Reason Codes that should be used when receiving an employee from a different company. Due to the limited ability to incorporate error conditions in the Phoenix System, it was not possible to programmatically prohibit the use of incorrect Reason Codes. Use of any other Reason Code when receiving an employee from a different company will result in the employee remaining in Leave of Absence status. Should an improper entry result in an employee being in Leave of Absence rather than Active status, the user must enter an additional transaction with the same date, increase the Effective Sequence by one, and use the Action/Reason Code Return from Leave (RFL)/Return from Leave (RFL).

Business Process HR0670 Transfer an Employee from a Different Company has been modified to reflect the changes. It can be found under HRMS, HRMS Business Processes, HR, HR-630 - HR-700, HR0670.

The Phoenix System Action/Reason Codes manual has also been modified to reflect the new Reason Codes. The revised manual may be found under HRMS, Action Reason Codes.

To assure consistency in query results, a process is being created by the Phoenix Project Team to change all transactions with an Action/Reason combination of Transfer/IN or Transfer/LAT to Transfer/HIR. This change will only be made if the losing Company was NSW. This mass change should be accomplished in the near future.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

04/04/2001 - Account Codes for Position Management Class

The Account Codes for Position Management course (BDZ003) has been revised. It covers the following topics:

adding and modifying data in the Account Code and Department Budget Tables

understanding these tables as they relate to labor distribution

understanding effective dates and their impact on data flow through the system

requesting Personal Services Projection reports

Duration is one day.

Due to classroom space issues, the yearly workshop will not take place. Instead, year-end processes and procedures for updating the Account Code and Department Budget Tables with new fiscal year data will be covered in BDZ 003. The class dates are as follows: April 25

May 3, 10, 11, 14, 15, 23

You may register now for the April 25th class using the Phoenix web registration system. Please regularly check the web registration system for May class postings. Central Support will try to notify you as soon as May classes are available for registration; if necessary, two classes may be added in June.

If you have any questions, please contact Connie Davis at 404-675-3956 (1-888-896-7771 outside Atlanta) or via email, at cldavis@doas.state.ga.us.

04/02/2001 - Payroll Quarterly Reports

The following payroll reports were run over the weekend of March 30th:

Unemployment Reports: TXxxx0002 - Quarterly State Employee Wage Listing

TXxxx0004 - Multiple Worksite Report

TXxxx0810 - Ga Qtrly UI Wage List

Additional Reports: TXxxx0010 - Quarterly Tax Summary

TXxxx0100 - W-4 Exemptions Report

TXxxx0900 - W-2 Annual Reporting Error Listing

If there are any questions regarding the reports listed above, please call or e-mail the Phoenix HRMS Production Support at (404) 657-3956 or DOASHRMS@doas.state.ga.us.

03/12/2001 - Pensionable Earnings Report

Every Friday night Phoenix runs a report ("COMPARE ANNUAL PENSIONABLE EARNINGS SALARY AND JOB COMP RATE" - BN___0571) which will show you which (if any) of your employees has had a salary change on Job Data but not had a corresponding entry on the Pensionable Earnings Panel.

Please check for this report in Document Direct every Monday. If there is a "version" dated on the previous Friday, the report found employees with this circumstance for your agency. If there is not a "version" dated on the previous Friday, the report found no employees with this circumstance.

If you do have employees on report BN___0571, you need to make the appropriate Pensionable Earnings Panel entry. If pension deductions and employer contributions have not been calculated on the employees' checks for the correct amounts, those must be corrected.

It is particularly important that the Pensionable Earnings Salary is correct as we near the time to pull the data from the Phoenix System to build the records for this year's Open Enrollment process.

03/12/2001 - Pensionable Earnings Panel

All employees in Phoenix should have an entry in the Pensionable Earnings Panel. (See business process BEN0110 "Enroll Employees in Pension Plan".) Most employees should be enrolled in either a regular pension plan (ERS, TRS, etc.) or enrolled in Georgia Defined Contribution Plan. For those few employees who are not required to be enrolled in any pension plan, they should have an entry in the Pensionable Earnings Panel showing that they are not assigned to a pension plan.

While reviewing data in Phoenix in preparation for the beginning of the Open Enrollment process, a comparison was made of employees in several agencies with entries in the

Pensionable Earnings Panel. (The salary on the Pensionable Earnings Panel is used to determine the Annual Benefits Base Rate for employees enrolled in ERS.) There are many employees with no entry in the Pensionable Earnings Panel.

To see the employees in your Agency who do not have an entry in the Pensionable Earnings Panel, you may use the Query Database and run an existing query named "0BN020_Missing_PEP". If no one in your office currently has access to the Query Database, please reference the Query page, under HRMS. In the meantime, you may call our Customer Support line (404-657-3956) for help running the query. If no one in your office currently has access to the Query Database, and you would like to run this query before you have completed the process to get access, send an email to rlawrenc@doas.state.ga.us requesting the query be run. The results will be sent to you on an Excel spreadsheet by return E-Mail.

In addition to preparing your employees for the Open Enrollment process, you may have employees who should have been set up for a Pension Plan some time in the past and the employee should have had Pension calculations and deductions on previous checks. (See business process BEN0110 "Enroll Employees in Pension Plan".) If you need assistance with correcting Pension records and deductions, call our Customer Support line (404-657-3956).

03/12/2001 - Job Summary Panel Changes

In response to a request by the Phoenix HRMS Customer Advisory Group, the Phoenix Project Team has implemented changes to the Job Summary Panel. The Job Summary Panel is a feature of the Inquire Menu under Administer Workforce (US).

Prior to this change, Job Summary provided a condensed version of each employee's work history. This history was available only to the current 'owner' of the employee's data and could not be viewed by users in other companies. The HRMS Customer Advisory Group requested that this history view be made available to ALL users in order to facilitate (a) employment verification, and (b) decision-making regarding employment offers to previous employees or employees of other companies. Accordingly, all users who have access to the Job Summary Panel will now be able to view data on all employees in the system. The user, however, must have the correct EmplID or SSN. Name search capability will not be available.

In addition to broadening access to the panel, additional prompts with associated data return have been added to the drop down menus. The new prompts and data fields are as follows:

Column 1 Effective Date

Effective Sequence Number Column 2

Action Short Description and Reason Short Description

Status - Active, Leave, Terminated, etc. Column 3

Job Code Number and Long Description

Department Number and Long Description

Position Number and Long Description Column 4

Company Number and Pay Group

Employee Type - Salaried or Hourly

FLSA Status and Merit Status (Classified or Unclassified)

Salary Plan and Grade

Standard Hours and Status (Regular or Temporary) Column 5

Annual Salary and Percentage Change from Prior Action

Hourly Salary and Percentage Change from Prior Action

Monthly Salary and Percentage Change from Prior Action

Semi-Monthly Salary and Percentage Change from Prior Action

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

03/05/2001 - HRMS Agency Support Changes

In order to improve HRMS agency support, the support staff has been organized into 2 teams. Each will have the primary responsibility for certain agencies. Agencies are divided as follows:

Team A

401-427, 436, 467, 921, 922, 977, 127-129 (DFACS, District PH, and MR Centers) and 3xx(CSB's)

Team A members:

Lynn Allen, Jinny Allison, Derek Barber, Connie Davis, Sylvia Silas, and Gwen Wiggins

Team B

415, 416, 428-490, 8xx (DTAE Colleges/Schools), 900 and Pensions

Team B members:

Tim King, Elizabeth Chaffin, Sherry Fogarty, Gwenda Martin, Sandra Parrish, and Genie Richardson

The helpdesk call message is being changed to reflect this support strategy. There will be 2 selections for HRMS support. If you have a problem connecting with your primary support staff and must call the FSS reception desk (404-656-2133), please ask them to connect you to the appropriate team.

03/02/2001 - Payroll Run Calendars and HRMS Timing Schedules

Into a Word doc, download the HRMS timing schedule for the second calendar quarter of 2001, or the state's final fiscal year quarter. The Excel file contains the calendars showing scheduled payroll runs.

In response to a request by the Phoenix HRMS Customer Advisory Group, the Phoenix Project Team has implemented a change to the manner in which FLSA Status is recorded and maintained. FLSA status will now be determined and maintained at the Position Data level and written to the employee Job Data record.

Prior to this change, FLSA Status was maintained at the Job Data level. Each Job Code was assigned an FLSA Status indicator. Any transaction entered at the employee level would initially default FLSA Status from the Job Code Table to Job Data. The FLSA Status indicator could then be changed by modifying the appropriate field on the Job Data 2 panel.

FLSA on Position Data

As of February 26, 2001, FLSA Status will be maintained at the position level only, in a new field on Position Data 3. FLSA STATUS ON THE JOB DATA 2 PANEL WILL BE DISPLAY ONLY AND NO LONGER AN ENTERABLE FIELD. At the request of the HRMS Customer Advisory Group, all FLSA determinations will be made only at the Position level and defaulted to the employee.

When necessary to change FLSA Status, a user will insert a new row in Position Data. The new Position row will normally create a new Job Data row for each incumbent of the position. (If there is more than one incumbent on a position, all incumbents WILL have the same FLSA Status written to Job Data. NOTE: If one or more incumbents of a position have a Job Data row with an effective date later than the effective date of the position transaction, a Job Data row will NOT be written and the FLSA Status of the employee and the position will not be in agreement.)

A new Action/Reason Code has been created for use when changing FLSA status. The new code is Position Chg/CFL.

Populating Current and Previous Position Records

INCUMBERED POSITIONS - The new procedure for maintaining FLSA Status was initialized by copying the FLSA Status on the maximum effective dated, active Job Data row of the incumbent to the new FLSA Status indicator on the Position Data 3 panel of the maximum effective dated, active row of that employee's position. If more than one incumbent existed for a position, the FLSA Status of the first incumbent identified by the initialization process was used to determine the status of the position. All earlier Position Data rows have the FLSA Status field populated with "SeeIncumbn", indicating that the FLSA Status for that date should be determined from Job Data 2 of the incumbent(s) at that time.

VACANT POSITIONS - All positions that were vacant at the time the FLSA Status field on the Position Data 3 panel was initialized were populated with a value of NONEXEMPT.

FLSA Status is no longer displayed on the Job Code Table 3 panel.

Discrepancy Listing

Agencies will be provided a report listing discrepancies between FLSA status on Job Data and Position Data. The report - Position/Incumbent FLSA Status Discrepancies (HRxxx0005) will be available in InfoPac during the week of February 26, 2001.

If the FLSA Status on an employee's Job Data 2 panel is not in agreement with the FLSA Status on the Position Data 3 panel, the discrepancy should be corrected by utilizing ONE of the following:

Transfer the employee (Action/Reason = Transfer/LAT) to a different position assigned to the same Job Code and having the correct FLSA status; or,

Enter a position transaction (Action/Reason = Position Chg/CFL) with the correct FLSA status and an effective date equal to, or later than, the current Job Data row. In order to correct an employee's Job Data record, it will be necessary to enter a position transaction even if the FLSA Status of the position is currently correct.

Active/Inactive Position Report

The Active/Inactive Pos Rpt (HRxxx0002x) has been modified to include the FLSA Status indicator.

Should you have any questions please contact the Agency Support Desk at 404-657-3956 or 1-888-896-7771.

02/20/2001 - Payroll Inquiry Panel Changes

The following Phoenix HRMS Payroll Panels have been modified to sort payroll data in descending pay end date order within the Company and Pay Group. This change has been made to provide quicker access to the most recent check data.

Paycheck Data

Pay Check Summary

Paycheck Distribution

02/02/2001 - New Job Data Panels

The Phoenix Project Team has developed two new "comments" panels that have been added to the Job Data panel group. These panels are intended to provide agency users and Central Support Staff the ability to record on-line comments and documentation regarding HR transactions. The "Job Comments" panel is provided for agency users and the "Job Audit Info" panel will document Central Support Staff correction mode actions.

Job Comments Access to Job Comments is through Administer Workforce, Use, Job Data. Any user with access to the Job Data 1, 2, and 3 panels will be able to view any rows of data in the Job Comments panel. Because of the nature of the Job Comment record, a new security operator class has been established for update access to this panel. It is MAHRJDC1. We strongly recommend that when you consider who should have access to this panel, you limit it to only those employees in your agency who should reasonably possess the ability to attach permanent comments to HR transactions. This would normally be a transactions supervisor or HR manager.

The panel was developed primarily for the purpose of providing users a mechanism to record information regarding agency entered Job Data correction-type rows. Each agency is at liberty, however, to determine the manner in which the panel will best meet the business needs of the agency.

Located in the Job Data panel group, a Job Comment row entered by a user is not directly linked to a Job Data transaction. The Job Comments panel is effective dated and effective sequenced and a comment may be associated with a transaction by utilizing a corresponding effective date and effective sequence. The comment need not be entered at the same time or by the same operator.

Example: Upon entry of a promotion transaction effective February 1, 2001, an employee's salary was incorrectly entered at a higher compensation rate than was intended. The user subsequently entered a second transaction effective the same date (February 1, 2001, Effective Sequence 1) using the Action/Reason Code of Data Chg/CSC and entered the correct (lower) compensation rate. A "Job Comment" record (effective date February 1, 2001, Effective Sequence 1) would be appropriate to document the reason for salary reduction.

A Job Comment row may also be entered that is not directly related to a specific transaction.

The Operator ID and a Date/Time stamp will automatically be entered each time a Job Comment is saved.

If information entered in a saved comment is incorrect or incomplete, the user should insert another row in the Job Comments panel with the same effective date as the original comment and increase the Effective Sequence by 1. Additional, explanatory, or correcting information may be entered in the new comment row. Because Job Comments are intended to produce an auditable documentation record for agencies, the DOAS Agency Support Help Desk WILL NOT normally modify or delete a Job Comment once the comment has been entered and saved by a user.

Job Audit Info Access to "Job Audit Info" is through Administer Workforce, Use, Job Data and is view only for agency users. This panel was created to maintain an audit trail and requires comments be entered by Central Support Staff anytime a Job Data row is inserted, modified, or deleted using correction mode. The supporting data will normally come from agency-submitted change request forms. Because of this we are requesting that change requests be submitted via e-mail with the completed MS Word change request form as an attachment. This will allow the Agency Support Help Desk staff to "cut and paste" the information directly into the Job Audit Info comments field.

Located in the Job Data panel group, a Job Audit Info row entered by Central Support Staff is directly linked to a Job Data transaction. The panel is effective dated and effective sequenced and a row will be associated with a transaction by utilizing a corresponding effective date and effective sequence. The Central Support Staff Operator ID and a Date/Time stamp will automatically be entered each time a row is saved. In addition to inserted text comments, the Effective Date, Action/Reason, Standard Hours, Position Number, Classified/Unclassified Indicator, Compensation Rate, and Compensation Frequency of the original action will also be saved (except for an inserted row, where the data will be blank).

Should you have any questions please contact the Agency Support Help Desk at 404-657-3956 or 1-888-896-7771.

02/01/2001 - HRMS & Financials Labor Distribution Systems

The Phoenix HRMS Payroll and Phoenix Financials Labor Distribution systems have been modified in order to take advantage of a recent PeopleSoft modification. Currently, you have to wait until after the On-Cycle pay period is confirmed and all On and Off cycle checks are processed through Paycheck Distribution before processing a reversal of an off-cycle check. Effective February 5, 2001, you can process Reversals and Reversal/Adjustments of Off-Cycle checks within the same pay period that they are originally entered in. You will receive a warning message "This check has not been posted to G/L," however during the On-Cycle confirm process, both entries will be passed to the Financial Labor Distribution Module.

Additionally, you can no longer assign a check number and check date combination on a Manual Check entry to more than one employee (for example: Check Number 9999999, Check Date 01-15-2001). The edit that has been added to look for duplication of check number and date adds an additional 30 to 40 seconds to the response time when saving a Manual check entry, but this is necessary to ensure the integrity of the data.

The modification to the Labor Module involves adding the Page Number, Line Number and Separate Check Number from the HRMS Pay Sheet as access keys to the Labor record. Please download this Word document for further information on the Labor Distribution Panel.

01/22/2001 - Department Number Change

A process has been developed to change the Department Number (Organization Number) for a group (or groups) of positions and the employees assigned to those positions. There are two (2) versions of this process: (1) Mass Department Change Within Company and (2) Mass Department Change Across Companies. This memo is primarily concerned with the "Within Company" process. The "Across Companies" version must be processed by Central Support, so call us if you are going to need this process.

Access to the "Mass Dept Chg Within Company" panel is through Develop Workforce, Manage Positions and Process. The Security Class Code for the panel is "MAHRMDC1". We strongly recommend that when you request security access to this panel, the request should be limited to a few employees in your Agency who are responsible for position processing or budgets.

Each Department Number Change process must be identified by the Company Number and the effective date of the action. Those values must first be added, and then can be accessed through "Update/Display." The panel allows the Agency to select the group of positions (and the employees assigned to those positions) to be changed by designating the Department Number, Maildrop, Location, County, Pay Group or Job Code. These are listed on the panel under the heading "For This Group." All of those selection criteria are optional except Department Number. By choosing more of these criteria, you may further limit the positions chosen for processing. The values that may be changed on the position records (and therefore on the Job Data records) are Department Number, Maildrop, Location and County. These are listed on the panel under the heading "Change Value To." All of those changeable values, except Department Number, are optional.

Multiple groups may be set up for change by inserting additional rows and filling out different "For This Group" combinations. Each of these combinations must be unique, but the "Change Value To" data may be repeated.

When you have completed your set up, you can run an edit report using the "Run" icon (the traffic light). Set the "Run Location" to "Server" and the "Output Destination" to "File." The edit report is called "PRELIMINARY UPDATE REPORT" (HRxxx0760). It will be delivered to you through normal INFOPAC distribution, or can be viewed through Document Direct within about an hour.

To actually process the Department Number Changes, you must contact Phoenix HRMS Customer Support (404-657-3956) to have the "Process Tonight" box checked.

Before using this process for the first time, please call the Phoenix HRMS Help Desk (404-657-3956).

01/16/2001 - Unemployment Insurance Reports

As was stated in the System News/Payroll News, Comment Number 9 - Unemployment Ins Reports, the following reports were run after the final W-2 load over the weekend of January 12th:

Unemployment Reports: TXxxx0002 - Quarterly State Employee Wage Listing

TXxxx0004 - Multiple Worksite Report

TXxxx0810 - Ga Qtrly U/I Wage List

Please note that the Multiple Worksite Report (TXxxx0004) may include an unreconciled difference between totals reflected on this report and the TXxxx0002 (Quarterly State Employee Wage Listing). This message is for informational purposes only. There are several situations that can take place during a quarter causing this message to appear on the Multiple Worksite Report (TXxxx0004).

The difference is detected when comparing unemployment amounts on paycheck detail to quarterly balances. Normally this difference occurs when a position has been moved to a different county within the quarter.

Paychecks are effective dated along with the position location. However, balances are reported based on which county the position is assigned to at the end of the quarter.

Another instance to consider that could cause the unreconciled difference between totals to be reported is if any off-cycle checks from a prior quarter are added in the totals.

DOAS creates the Unemployment tape and is responsible for submitting it to the Dept. of Labor as well as the Risk Management Section of DOAS.

Additional reports that were run over the weekend of January 12th: TXxxx910AU - W-2 Audit Report

TXxxx910ER - W-2 Record Error

TXxxx916ST - State W-2 Tax Totals

TXxxx914 - Form 6559 Transmitter Totals

TXxxx010 - Quarterly Tax Summary

01/16/2001 - Year To Date Balance Report

A Year To Date Balance Report (PYxxx0413) is now available in the Phoenix HRMS system. The report will list the following balance information: Check YTD, Earnings, Deduction and Taxes for each individual within a company. The report will be sorted alphabetically and have one employee per page. A Company Summary page will also be included.

The report has been distributed through Document Direct (Infopac) and will have a retention period of 5 years. Because the report contains one person per page and produces a large printout, we have set the default number of copies to zero. You can view the report in Document Direct and selectively print individual pages, if necessary. If you would like to receive the printed output, please contact the HRMS Helpdesk at (404) 657-3956 and they will have it printed. This report will also be included in the list of reports for the CD-ROM disk.

Download a sample of the report.

01/02/2001 - Personal Leave Process Information

As a reminder, the Personal Leave Process will be run the night of Sunday, January 7, 2001 (January 9 for DOT). All Personal Leave elections must be completed by the close of business on Saturday, January 6th in order for the system to process the election request. If entries are not completed by Saturday, January 6th, manual adjustments are necessary. Manual adjustments may also require manual enrollment in the Personal Leave Plan.

An "Annual Personal Leave Process Audit" report will be distributed to each company after the Personal Leave Process has been completed. This audit report will reflect the employee's EMPLID, Employment Record #, Name, Dept ID, Previous Sick Leave Balance (prior to the conversion of elected hours to Personal Leave), Leave Elected (the number of hours elected to be converted from Sick Leave to Personal Leave) and New Sick Leave Balance.

The report will be sorted by company followed by department ID, and employee last name. The report will also indicate if the employee is electing Personal Leave for the first time (e.g., the employee is not already enrolled in Personal Leave in Phoenix).

An "Error/Warning Message" will also appear on the report if one of the following situations occurs:

Warning--Sick leave balance is less than the # elected hours; update performed with previous sick leave balance: this warning message will appear if the employee was eligible when the notices were processed (12/07/00), however, in the meantime, the employee has used some of their available Sick Leave and is no longer eligible for the same amount. In this case, the employee will be enrolled for the lesser amount of available Sick Leave

Error--Sick leave balance is less than or equal to zero, no update was performed: this error message will appear if the employee was eligible when the notices were processed (12/07/00), however, in the meantime, the employee has used all of their available Sick Leave and is no longer eligible for Personal Leave. In this case, the employee will not be enrolled in Personal Leave.

If any questions arise following the Personal Leave Process, this audit report can be used to verify Personal Leave elections. The Leave Usage History Panel can also be viewed to verify Personal Leave Process elections.

01/02/2001 - Payroll - Quarterly Reports

Due to timing issues with W-2 processing, printing of the following reports will be delayed until after the final W-2 load process tentatively scheduled for the night of January 12, 2001:

TXxxx0002 - Quarterly State Employee Wage Listing

TXxxx0004 - Multiple Worksite Report

TXxxx0810 - Ga Qtrly U/I Wage List

Delaying these reports will ensure that any prior year transactions made will be included in 4th quarter tax totals.

Please note that if for any reason W-2 processing is not complete by January 12, 2001 then the Unemployment reports will be printed on January 19, 2001 along with all W-2 reports.

The TXxxx0100 - W-4 Exemptions Report (those employees who claim over nine exemptions) will be run Friday night, December 29th.

If there are questions regarding the above changes, please call or e-mail HRMS System Support at 404-657-3956 or DOASHRMS@doas.state.ga.us, respectively.